



USDA Weekly Retail Chicken Feature Activity

Advertised Prices for Chicken to Consumers at Major Retail Supermarket Outlets during the period of 11/25 thru 12/01.

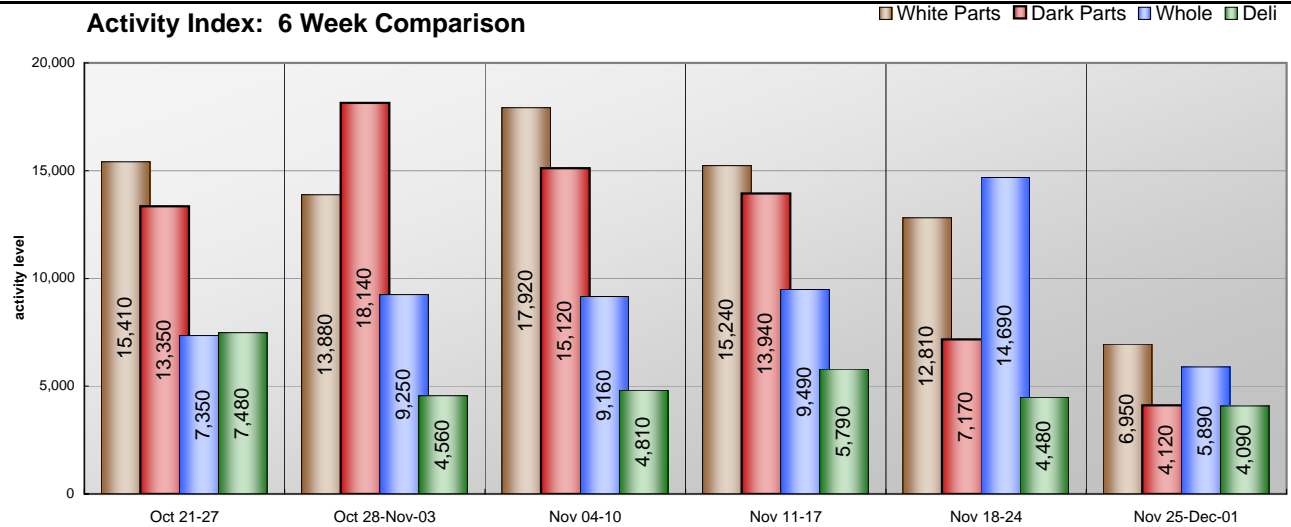
(prices in dollars per pound, fresh tray-pack product unless otherwise noted)

Fri. Nov 25, 2005

NATIONAL SUMMARY

| | THIS WEEK | | LAST WEEK | |
|----------------------------|-------------------------|---------|-------------------------|---------|
| Feature Rate 1/ | 50.9% of 16,700 outlets | | 76.9% of 16,700 outlets | |
| Special Rate 2/ | 1.9% | | 6.8% | |
| Activity Index 3/ | 21,690 | | 39,210 | |
| | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRD: | | | | |
| bagged fryer | 1,760 | 0.89 | 960 | 1.07 |
| cut-up fryer | 120 | 1.28 | 480 | 1.37 |
| bagged roaster | 2,830 | 1.16 | 9,270 | 1.19 |
| cornish hen | 1,180 | 1.70 | 3,980 | 1.99 |
| DELICATESSEN: | | | | |
| Whole Rotisserie: | | | | |
| < 2 lbs. | 3,070 | 5.60 | 3,350 | 5.18 |
| 2.1-3.0 lbs. | 160 | 7.99 | 520 | 7.09 |
| Fried Chicken 8-Pc | 860 | 5.76 | 610 | 5.80 |
| PARTS: | | | | |
| Bnls/Sknls Breast | | | | |
| regular pack | 2,250 | 2.59 | 4,100 | 2.96 |
| value pack | 1,650 | 2.23 | 1,770 | 2.76 |
| thin sliced | 940 | 3.65 | 1,240 | 4.05 |
| Breast Tenders | | | | |
| regular pack | 1,150 | 3.35 | 2,480 | 3.42 |
| value pack | 20 | 2.78 | | |
| Split, bn-in Breast | | | | |
| regular pack | 480 | 1.54 | 1,650 | 1.50 |
| value pack | 440 | 1.11 | 530 | 1.08 |
| Whole Wings | | | | |
| | 20 | 1.49 | 1,040 | 1.90 |
| Leg Quarters | | | | |
| | 2,390 | 0.68 | 1,130 | 0.89 |
| Legs | | | | |
| | | | 450 | 1.04 |
| Thighs | | | | |
| regular pack | 350 | 1.29 | 1,160 | 1.04 |
| value pack | 490 | 1.11 | 1,080 | 1.06 |
| Drumsticks | | | | |
| regular pack | 350 | 1.35 | 1,430 | 1.19 |
| value pack | 380 | 1.19 | 1,180 | 1.10 |
| Bnls/Sknls Thighs | | | | |
| regular pack | 160 | 1.99 | 740 | 2.31 |
| value pack | | | | |
| Combo Packs (9 pc) | | | | |
| drum-thigh-breast | 530 | 1.50 | | |
| drum-thigh-wing | 110 | 1.45 | 60 | 1.49 |

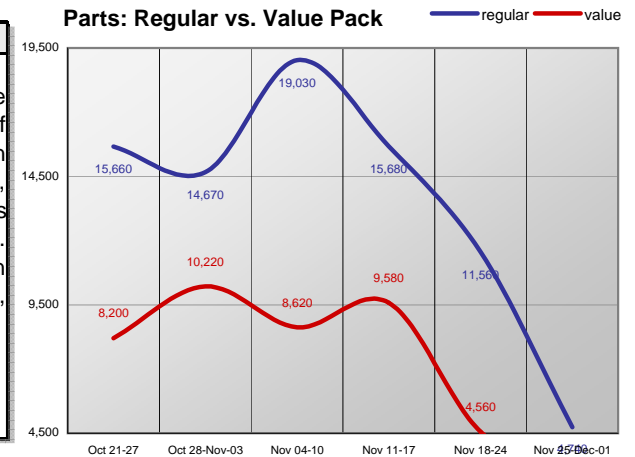
Activity Index: 6 Week Comparison



Chicken Featuring - 11/25 thru 12/01

Retailers showed little interest in featuring chicken during the Thanksgiving week as national summary figures were cut in half on volume compared to the same period a week earlier. On whole body, rotisserie held on volume and increased prices, bagged fryer increased volume and lowered prices. Most all parts dropped in volume with the exception of one, leg quarters. Consumers should expect to see some good values appear in the meat case during the next few weeks, not only on chicken, but beef and pork as well.

Parts: Regular vs. Value Pack



Explanatory Notes

All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: FEATURE RATE: the amount of sampled stores advertising any reported chicken item during the current week, expressed as a percentage of the total sample. **2/: SPECIAL RATE:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **3/: ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised chicken item (e.g., a retailer with 100 outlets featuring 3 chicken items has an activity index of 300). **4/: STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets.



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| | NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT) | | | | SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV) | | | | MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) | | | |
|----------------------------|--|------------------------------|--------|---------------|--|------------------------------|--------|---------------|--|------------------------------|--------|---------------|
| Feature Rate 1/ | 87.2% of 3,800 sampled outlets | | | | 46.2% of 5,000 sampled outlets | | | | 35.3% of 2,400 sampled outlets | | | |
| Special Rate 2/ | 5.9% of stores w/ no-price promotions | | | | 0.0% of stores w/ no-price promotions | | | | 2.1% of stores w/ no-price promotions | | | |
| Activity Index 3/ | Activity Index = 12,940 | | | | Activity Index = 5,210 | | | | Activity Index = 1,240 | | | |
| WHOLE BIRD: | Price Range | | Stores | Wtd Avg 4/ | Price Range | | Stores | Wtd Avg 4/ | Price Range | | Stores | Wtd Avg 4/ |
| bagged fryer | 0.89 - 1.29 | | 1,160 | 1.00 | 0.69 | | 80 | 0.69 | 0.77 - 0.89 | | 70 | 0.88 |
| cut-up fryer | 1.19 - 1.29 | | 120 | 1.28 | | | | | | | | |
| bagged roaster | 0.98 - 1.39 | | 1,870 | 1.22 | 0.89 - 1.29 | | 730 | 1.04 | 0.89 - 1.39 | | 230 | 1.09 |
| cornish hen | 1.29 - 1.99 | | 1,060 | 1.68 | 1.19 - 1.79 | | 80 | 1.45 | 1.99 - 2.99 | | 40 | 2.55 |
| DELICATESSEN: | | | | | | | | | | | | |
| Whole Rotisserie: | | | | | | | | | | | | |
| < 2 lbs. | 4.99 - 5.99 | each | 350 | 5.50 | 3.99 - 5.99 | each | 1,250 | 5.36 | 4.99 - 5.99 | each | 230 | 5.53 |
| 2.1-3.0 lbs. | 7.99 | each | 160 | 7.99 | | | | | | | | |
| Fried Chicken 8-Pc | 5.89 - 6.99 | each | 400 | 6.31 | 4.99 - 5.79 | each | 280 | 5.18 | 4.99 | each | 10 | 4.99 |
| PARTS: | Processor Label price range | Private Label price range | Stores | Wtd Avg | Processor Label price range | Private Label price range | Stores | Wtd Avg | Processor Label price range | Private Label price range | Stores | Wtd Avg |
| Bnls/Sknls Breast | | | | | | | | | | | | |
| regular pack | 1.89 - 3.99 | 1.99 - 3.49 | 1,250 | 2.96 | 1.78 - 2.99 | 1.79 - 2.99 | 900 | 2.15 | 1.99 | | 100 | 1.99 |
| value pack | 2.22 - 2.49 | 1.49 - 2.69 | 1,580 | 2.22 | | | | | | 2.69 | 50 | 2.69 |
| thin sliced | 3.99 - 4.05 | 2.99 - 3.99 | 940 | 3.65 | | | | | | | | |
| Breast Tenders | | | | | | | | | | | | |
| regular pack | 3.49 | 1.99 - 3.99 | 590 | 3.49 | 2.99 | | 350 | 2.99 | 2.99 | 3.99 | 210 | 3.54 |
| value pack | | | | | | 2.78 | 20 | 2.78 | | | | |
| Split, bn-in Breast | | | | | | | | | | | | |
| regular pack | 1.39 | 1.29 - 1.99 | 380 | 1.46 | 2.78 | 1.69 | 90 | 1.95 | 0.99 | | 10 | 0.99 |
| value pack | | 0.99 - 1.58 | 230 | 1.09 | 0.99 | 1.58 | 80 | 1.15 | 1.59 | | 30 | 1.59 |
| Whole Wings | | | | | | | | | | 1.49 | 20 | 1.49 |
| Leg Quarters | 0.59 - 0.79 | 0.49 - 0.79 | 1,040 | 0.71 | 0.49 | 0.69 - 0.79 | 1,150 | 0.66 | | 0.68 | 200 | 0.68 |
| Legs | | | | | | | | | | | | |
| Thighs | | | | | | | | | | | | |
| regular pack | 1.29 | 1.19 - 1.39 | 320 | 1.32 | | | | | | | | |
| value pack | | 0.99 - 1.59 | 250 | 1.27 | | 1.18 - 1.19 | 100 | 1.19 | 0.77 | | 10 | 0.77 |
| Drumsticks | | | | | | | | | | | | |
| regular pack | 1.29 | 1.19 - 1.59 | 320 | 1.38 | | | | | | | | |
| value pack | | 1.18 - 1.79 | 140 | 1.62 | | 1.18 - 1.19 | 100 | 1.19 | 0.77 | | 10 | 0.77 |
| Bnls/Sknls Thighs | | | | | | | | | | | | |
| regular pack | 1.99 | | 160 | 1.99 | | | | | | | | |
| value pack | | | | | | | | | | | | |
| Combo Packs (9 pc) | | | | | | | | | | | | |
| drum-thigh-breast | 1.49 - 1.59 | | 510 | 1.52 | | | | | 0.99 | | 20 | 0.99 |
| drum-thigh-wing | | 1.39 - 1.49 | 110 | 1.45 | | | | | | | | |

Note: See page 1 for explanatory notes.

Source: USDA Agricultural Marketing Service, Poultry Market News - (202) 720-6911

website: <http://www.ams.usda.gov/poultry/pymn.htm>

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Fri. Nov 25, 2005

| | SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT) | | | SOUTHWEST U.S. (CA,NV) | | | NORTHWEST U.S. (ID,MT,OR,WA,WY) | | |
|---|---|------------------------------|----------------|---|------------------------------|----------------|---|------------------------------|----------------|
| Feature Rate 1/ Special Rate 2/ Activity Index 3/ | 32.4% of 2,600 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 830 | | | 35.8% of 2,000 sampled outlets 0.8% of stores w/ no-price promotions Activity Index = 970 | | | 53.5% of 900 sampled outlets 2.6% of stores w/ no-price promotions Activity Index = 500 | | |
| WHOLE BIRD: | Price Range | Stores | Wtd Avg 4/ | Price Range | Stores | Wtd Avg 4/ | Price Range | Stores | Wtd Avg 4/ |
| bagged fryer | 0.59 | 320 | 0.59 | 0.77 | 130 | 0.77 | | | |
| cut-up fryer | | | | | | | | | |
| bagged roaster | | | | | | | | | |
| cornish hen | | | | | | | | | |
| DELICATESSEN: | | | | | | | | | |
| Whole Rotisserie: | | | | | | | | | |
| < 2 lbs. | 5.99 each | 240 | 5.99 | 5.99 each | 580 | 5.99 | 4.99 - 5.99 each | 420 | 5.70 |
| 2.1-3.0 lbs. | | | | | | | | | |
| Fried Chicken 8-Pc | 4.99 - 5.79 each | 170 | 5.45 | | | | | | |
| PARTS: | Processor Label price range | Private Label price range | Stores Wtd Avg | Processor Label price range | Private Label price range | Stores Wtd Avg | Processor Label price range | Private Label price range | Stores Wtd Avg |
| Bnls/Sknls Breast | | | | | | | | | |
| regular pack | | | | | | | 1.99 | | 20 1.99 |
| value pack | | | | | | | | | |
| thin sliced | | | | | | | | | |
| Breast Tenders | | | | | | | | | |
| regular pack | | | | | | | | | |
| value pack | | | | | | | | | |
| Split, bn-in Breast | | | | | | | | | |
| regular pack | | | | | | | | | |
| value pack | | 0.89 - 1.00 | 100 0.97 | | | | | | |
| Whole Wings | | | | | | | | | |
| Leg Quarters | | | | | | | | | |
| Legs | | | | | | | | | |
| Thighs | | | | | | | | | |
| regular pack | | | | | | | 0.99 | | 30 0.99 |
| value pack | | | | 0.77 | | 130 0.77 | | | |
| Drumsticks | | | | | | | | | |
| regular pack | | | | 0.77 | | 130 0.77 | 0.99 | | 30 0.99 |
| value pack | | | | | | | | | |
| Bnls/Sknls Thighs | | | | | | | | | |
| regular pack | | | | | | | | | |
| value pack | | | | | | | | | |
| Combo Packs (9 pc) | | | | | | | | | |
| drum-thigh-breast | | | | | | | | | |
| drum-thigh-wing | | | | | | | | | |

Note: See page 1 for explanatory notes.

Source: USDA Agricultural Marketing Service, Poultry Market News - (202) 720-6911

website: <http://www.ams.usda.gov/poultry/pymn.htm>

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